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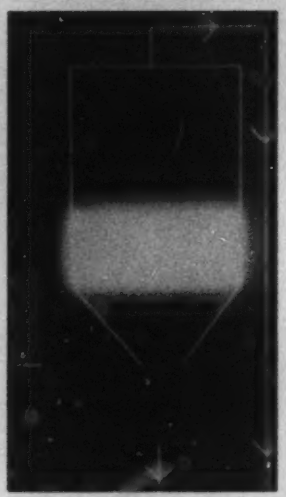

COVER STORY

Process control takes a lot of the guesswork out of the manufacturing process, and in the end, makes the manufacturing scenario reliable.

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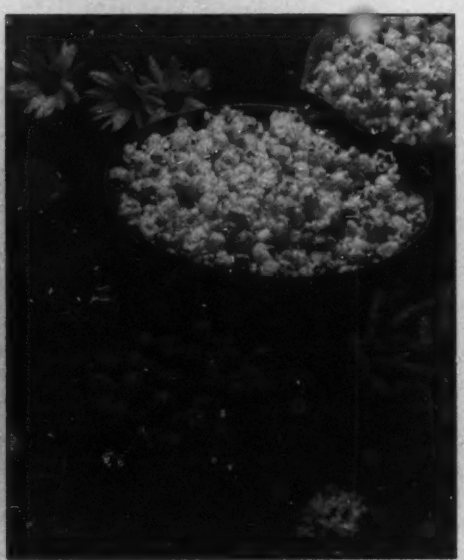

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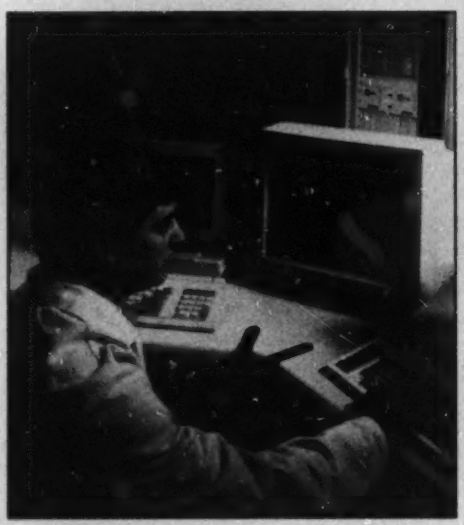

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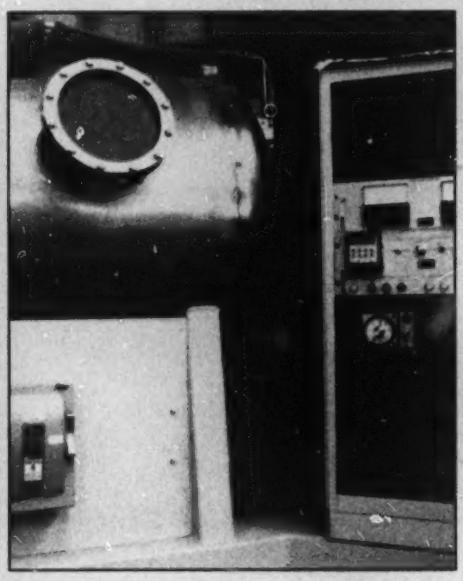

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Special Emphasis

CONTROLLED ATMOSPHERE AND VACUUM PACKAGING

The twin technologies of vacuum-packaging and controlled atmosphere packaging (CAP) are accelerating the trend toward centralized retail meat cutting.

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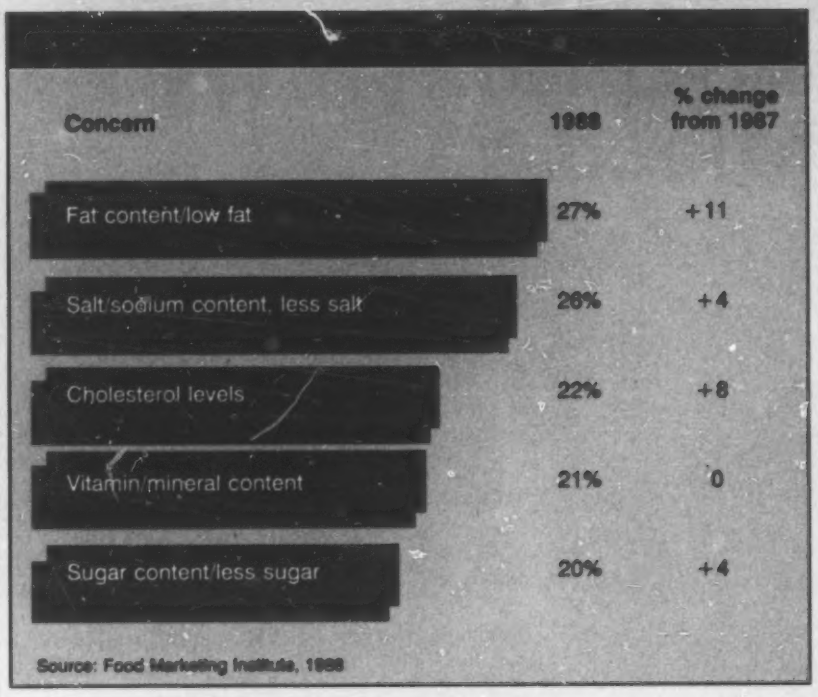
Fat replaces salt as consumers' top nutrition concern, says FMI



Fat has replaced salt as the major nutrition concern of consumers, according to the 1988 "State Of The Industry" report presented May 9 at the annual Food Marketing Institute convention in Chicago.

The finding marks a dramatic reversal in consumer attitude over the past five years, noted Dean Werries, president and CEO of the Fleming Companies, Inc. In 1983, 18 percent of consumers surveyed cited salt as their major concern as compared to only nine percent who listed fat as their major concern. "This year, however, the concerns were reversed—fat 27 percent, salt 26 percent," Werries reported. "Close behind were cholesterol (22 percent) and vitamin/mineral content (21 percent)." Concern about fat and cholesterol grew at a gradual pace over the past five years "but the largest changes occurred in the past year," Werries continued. "Concern over fat content increased 11 percent, and for cholesterol eight percent."

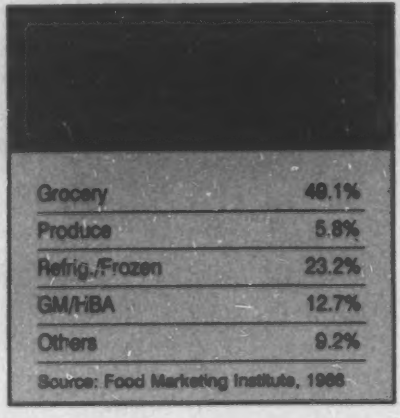
Because nutrition concerns increase with age, said FMI Senior Vice President Tim Hammonds, the importance of health and nutrition in food marketing will grow with our aging population. By the year 2000, Hammonds pointed out, nearly 40 percent of the U.S. population will be over age 40. "By the turn of the century, we're going to raise the mid-life crisis into a national art form," he added.

More shoppers are checking labels for caloric content (48 percent this year versus 47 percent last year) and for fat content (46 percent versus 44 percent in '87), Hammonds reported. More than half (54 percent) check labels for salt or sodium content.

Consumers are also moving toward an attitude of "moderation, not elimination," Hammonds continued, leading to a "watershed change" in agricultural production. Farmers no longer simply bring products to market with the hope consumers will buy them; today, "biotechnology lets farmers track consumer preferences and actually redesign their animals and products to fit the marketplace," said Hammonds. "We are on the eve of producing traditional plants and animals with vastly superior nutrition characteristics." The meat industry, "has made great strides in breeding leaner animals, with pork producers leading the way," added Werries.

Further highlights from the FMI report:

- Mergers and acquisitions continued at a brisk pace despite forecasts they would cool under new federal tax laws and state anti-takeover legislation. In 1987 there were 31 supermarket mergers/acquisitions and 33 grocery wholesaler takeovers—the latter "more significant when you consider that their numbers were already much smaller." As hostile takeover threats force large public companies to focus on short-term profits rather than investing for the future, foreign investors are taking the opposite view: They're looking for long-term growth opportunities in the U.S. which they can't find at home.
- Produce for the second consecutive year topped the list of factors most important to consumers (98 percent) in selecting a supermarket, proving that last year's finding "was no fluke." The accent on produce reflects several trends: Health/nutrition, fresh foods, greater variety. Other factors: Variety (96 percent); quality meat (94 percent); low prices (94 percent); convenient location (92 percent); readable and accurate shelf tags (92 percent).
- New products and services: Consumers most frequently noted the availability of microwaveable foods (93 percent), followed by availability of fresh deli or carry-out foods (80 percent).
- Food safety: Eighty-nine percent of shoppers check package condition, 79 percent check expiration dates and 76 percent prefer tamper-evident packaging when they have a choice.
- Labor shortages face the supermarket industry at a time when shoppers are demanding more service. Some operators are already recruiting from less traditional sources such as

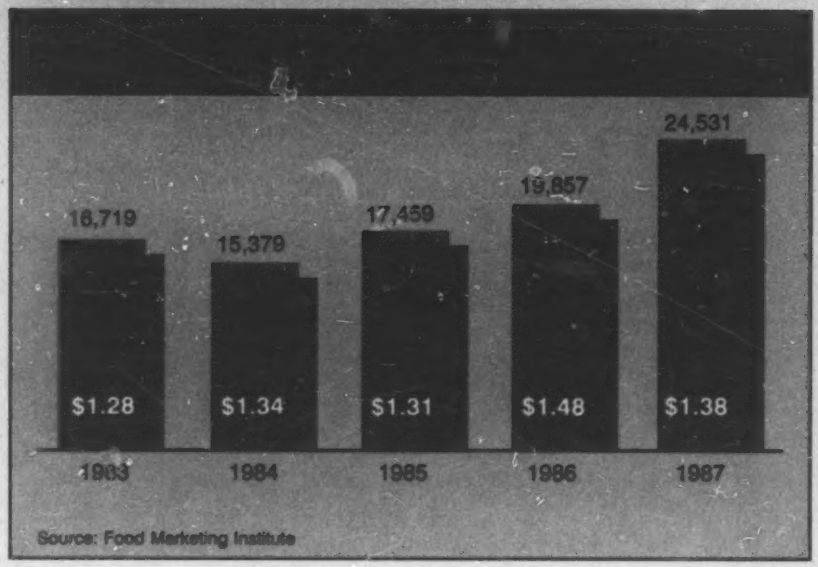


senior citizens and the handicapped, some are busing employees to work from inner-city areas.

• New product buying criteria: Eighty-eight percent of supermarket buyers use inventory turns, 59 percent use product mix, 52 percent use customer feedback, 40 percent use scanning data and a surprisingly low 12 percent use DPP (direct product profit) in making buying decisions.

• JIT: In spite of those who believe that the threat of being out-of-stock means just-in-time deliveries cannot work in supermarkets, "other industries are making it work and European (supermarket) operators are making it work," said Hammonds. "Someone is going to figure out how to make the supermarket version of just-in-time delivery work."

• Deals and allowances: The recent Walter Salmon study of trade promotion practices, while greeted cooly at the FMI Midwinter Executive Conference, brought the issue "out of the closet" and "opened the door to creativity where only accusations and distrust existed before," said Hammonds. One clear point made by the study, Werries added: "In an industry this diverse, there are no universal solutions to the issue of deals and allowances." Practices such as "slotting allowances," "street money," "diverting," "forward buying," "classes of trade" and others "have not come about be-



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cause our industry leaders have suddenly become men of ill will," said Werries. "Each in its own way is a symptom of a changing industry. We are literally redefining the grocery business in response to a changing consumer, changing technology and a changing global economy."

Hypermarkets: Emerging revolution?

"The most newsworthy retail development this year is the arrival of the European-style hypermarket in America," said Tim Hammonds, senior VP of Food Marketing Institute, in presenting FMI's annual "State Of The Industry" report May 9 in Chicago.

These megamarkets—"malls without walls"—combine supermarkets with discount department stores and cover 150,000 to 300,000 sq. ft. (some "the space of five football fields"). But "for some shoppers that's a little overwhelming," said Hammonds. "Although the jury is still out on whether stores will be successful in the U.S., one thing is clear: They will certainly teach all of us a lot about how to merchandise non-foods in a grocery setting. For anyone facing these behemoths, niche marketing becomes more important than ever."

Veteran observers of the supermarket industry note that there's really nothing new about the concept: Some U.S. supermarket chains started operating large combination grocery/general-merchandise discount stores at least 25 years ago, and the "general store" goes back to colonial times. What's new about the hypermarket, however, is its sheer size and degree of automation.

According to the FMI report, supermarkets have grown in size over the past decade as the number of stores declined slightly. Today's average U.S. supermarket covers 46,892 sq. ft., with 33,000 sq. ft. of selling area. As U.S. population growth rate declines, "the industry is casting bigger nets to catch a slower-growing population," said Hammonds. "Today, stores are going after new retail opportunities." One example: Kroger Co. is now the nation's largest retail florist.

Willard R. Bishop, Jr., president of Willard Bishop Consulting, Ltd. (Barrington, IL), reported results of a consumer reaction survey to two new hypermarkets: Hypermarket USA, a joint venture started-up by Tom Thumb and Wal-Mart last December in the Dallas suburb of Garland, TX; and Carrefour, opened last February by the French firm in northeast Philadelphia. The study is based on telephone interviews of 500 random households within a close radius of each store. Major conclusions, said Bishop:

- Consumers are "very enthusiastic" about the hypermarket concept based on two factors: Low prices and one-stop shopping, although Hypermarket USA has a stronger image as a low-price operator.
- Perishable departments project a strong "freshness" image spanning produce, bakery, seafood, deli and

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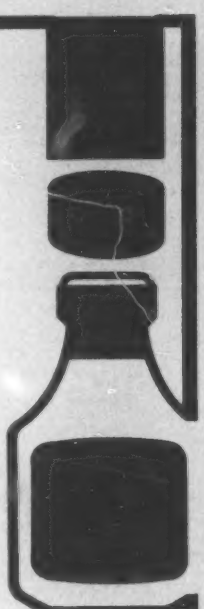

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